

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Kruthers, Heather H (for Public Administrator)

Final Report of Successor Administrator for Insolvent Estate and Petition for Discharge

DO	D: 01/20/2006	<b>PUBLIC ADMINISTRATOR,</b> Successor Administrator, is petitioner.	NEEDS/PROBLEMS/ COMMENTS:
		Petitioner states:	
		<ul> <li>On 09/17/2014, by minute order, petitioner was</li> </ul>	
		appointed successor administrator of the decedent's	
Cor	nt. from	estate.	
	Aff.Sub.Wit.	<ul> <li>Decedent left a Will dated 03/01/1995, disposing of</li> </ul>	
	Verified	property within the subject matter jurisdiction of this Court.	
✓	Verified	Said Will was admitted to Probate on 06/06/2006.	
1	Inventory	<ul> <li>Petitioner has performed all duties required in the</li> </ul>	
H	-	administration of the estate of the decedent. The estate	
	PTC	was administered under the Independent Administration	
<b>✓</b>	Not.Cred.	of Estates Act. The estate is in a condition to be closed.	
	Notice of	The state of California Franchise Tax Board filed a	
✓	Notice of	creditor's claim for \$1,785.22 on 11/04/2008. The claim	
$\vdash$	Hrg	was never allowed or rejected.	
✓	Aff.Mail w/	<ul> <li>Notice to Director of Health Services is not required</li> </ul>	
	Aff.Pub.	pursuant to Probate Code 9202 because the decedent	
$\vdash$		did not receive Medi-Cal benefits.	
$\vdash$	Sp.Ntc.	<ul> <li>A Final Inventory and Appraisal (&amp;A) of the estate was</li> </ul>	
	Pers.Serv.	filed by the former administrator on 11/15/2006, consisting	
	Conf.	of personal property of \$700 and two parcels of real	
	Screen	property value at \$510,000.00.	
1	<b>Letters</b> 6/21/06	<ul> <li>All assets of the estate are the decedent's separate</li> </ul>	
<b>'</b>		•	
	Duties/Supp	property. There is no supposed of good upt because the Rublic	
	Objections	There is no summary of account because the Public  A designificant or no year badd a partral of the account.  As	
Ì	Video	Administrator never had control of the assets. As	
	Receipt	reported in his status report filed on 12/09/2014, the real	
		properties were both foreclosed upon, and the	
$\vdash \vdash$	CI Report	whereabouts of the three items of personal property are	
	9202	unknown.	
✓	Order	Petitioner and her attorney waive any fees for their  sentings.	
H	Aff. Posting	Services.	Reviewed by: LV
$\vdash$	Status Rpt	Wherefore, petitioner prays that:  1. The final report properted berowith he settled allowed	Reviewed by: Ev
	sidios irpi	The final report prepared herewith be settled, allowed  and approved as find, and all gets and preparedings of	03/20/2015
$\vdash$	LICCIEA	and approved as filed, and all acts and proceedings of	
$\vdash$	UCCJEA	petitioner as successor administrator be confirmed and	Updates:
	Citation	approved;	Recommendation:
✓	FTB Notice	The Public Administrator be discharged as successor     administrator by all all all all all all all all all al	File 1 – Mayo
		administrator; and	
		3. For such other and further orders as the Court considers	
		just and proper.	

Atty Donaldson, Larry A. (pro per – former Executor)

Atty Kruthers, Heather H. (for Public Administrator – successor Administrator)

Amended Trust Accounting for 2007, 2008, 2009, 2010, 2011, 2012 and Partial Accounting 2013

DOD: 06/22/07					
Cont. from 040714, 050514, 070714,					
090814, 102314,					
012115					
Aff.Sub.Wit.					
Verified					
Inventory					
PTC					
Not.Cred.					
Notice of					
Hrg					
Aff.Mail					
Aff.Pub.					
Sp.Ntc.					
Pers.Serv.					
Conf.					
Screen					
Letters					
Duties/Supp					
Objections					
Video					
Receipt					
CI Report					
9202					
Order	_				
Aff. Posting	_				
Status Rpt					
UCCJEA					
Citation	4				
FTB Notice					

LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.

The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/1 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.

#### **NEEDS/PROBLEMS/COMMENTS:**

See Page 7 for a related matter.

#### **CONTINUED FROM 01/21/15**

Minute Order from 01/21/15 states: Mr. Rindlisbacher represents that all of the necessary information is with the accountant and he is working on the final review of the accounting; needs 30-60 days. If the accounting is filed at least 2 days prior to the hearing date, then Mr. Rindlisbacher does not have to appear at the hearing. However, Larry Donaldson is ordered to be personally present in court on 03/25/15. The Court orders the related Paul Harvey Wallace Trust matter be set for 03/25/15 as well.

As of 03/20/15, nothing further has been filed.

1. The accounting does not comply with the Probate Code, specifically the format for accountings outlined in Probate Code §1060. In addition the accounting appears to be for the Paul Harvey Wallace Trust. The Paul Harvey Wallace Trust is not before the court. Mr. Donaldson needs to file an accounting for the Estate of Paul Harvey Wallace.

Reviewed by: JF

Reviewed on: 03/20/15

Updates:

Recommendation:

File 2A – Wallace

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00

DC	D: 06/22/07	LARRY A. DONALDSON, friend, was	NEEDS/PROBLEMS/COMMENTS:
	-	appointed as Executor without bond on	,
		<ul> <li>05/27/08 and Letters were issued on 06/18/08.</li> </ul>	CONTINUED FROM 01/21/15
		00/10/00.	Minute Order from 01/21/15 states: Mr.
	ont. from 010214	On 07/26/13, <b>LARRY DONALDSON</b>	Rindlisbacher represents that all of the
	3014, 022014,	resigned as Executor and the <b>PUBLIC</b>	necessary information is with the accountant and he is working on the
	1714, 050514,	ADMINISTRATOR, was appointed as	final review of the accounting; needs 30-
	0714, 090814,	Administrator. Letters of Administration	60 days. If the accounting is filed at least
	2314, 012115	were issued to the Public Administrator	2 days prior to the hearing date, then Mr.
	Aff.Sub.Wit.	on 08/01/13.	Rindlisbacher does not have to appear
	Verified	Minute order from 12/05/13 set this	at the hearing. However, Larry  Donaldson is ordered to be personally
	Inventory	matter for an Order to Show Cause and	present in court on 03/25/15. The Court
	PTC	states: The Court sets the matter for an	orders the related Paul Harvey Wallace
	Not.Cred.	Order to Show Cause on 01/02/14	Trust matter be set for 03/25/15 as well.
	Notice of	regarding Larry Donaldson's failure to	As of 03/20/15, nothing further has been
	Hrg	appear and imposition of sanctions in the amount of \$600.00. The Court sets a	filed.
	Aff.Mail	further Order to Show Cause on	
	Aff.Pub.	01/02/14 regarding Larry Donaldson's	
	Sp.Ntc.	failure to provide information to the	
	Pers.Serv.	successor administrator timely and	
	Conf.	imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to	
	Screen	be personally present on 01/02/14.	
	Letters	= De personally present off off, oz, 14.	
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202	_	
	Order		
	Aff. Posting	_	Reviewed by: JF
	Status Rpt	_	<b>Reviewed on:</b> 03/20/15
	UCCJEA	_	Updates:
	Citation	_	Recommendation:
	FTB Notice	1	File 2B – Wallace

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Order to Show Cause Re: Failure to Provide Information to the Successor Administrator Timely; Imposition of Sanctions in the Amount of \$800.00

DOD: 06/22/07	LARRY A. DONALDSON, friend, was	NEEDS/PROBLEMS/COMMENTS:
	appointed as Executor without bond on	·
	05/27/08 and Letters were issued on 06/18/08.	CONTINUED FROM 10/23/14
	00/10/00.	Minute Order from 01/21/15 states: Mr.
Cont from 010014	On 07/26/13, <b>LARRY DONALDSON</b>	Rindlisbacher represents that all of the
Cont. from 010214,	resigned as Executor and the <b>PUBLIC</b>	necessary information is with the
013014, 022014, 050514, 070714,	ADMINISTRATOR, was appointed as	accountant and he is working on the final review of the accounting; needs 30-
090814, 102314,	Administrator. Letters of Administration	60 days. If the accounting is filed at least
012115	were issued to the Public Administrator	2 days prior to the hearing date, then Mr.
Aff.Sub.Wit.	on 08/01/13.	Rindlisbacher does not have to appear
Verified		at the hearing. However, Larry
	Minute order from 12/05/13 set this	Donaldson is ordered to be personally present in court on 03/25/15. The Court
Inventory	matter for an Order to Show Cause and	orders the related Paul Harvey Wallace
PTC	states: The Court sets the matter for an	Trust matter be set for 03/25/15 as well.
Not.Cred.	Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to	
Notice of	appear and imposition of sanctions in	As of 03/20/15, nothing further has been filed.
Hrg	the amount of \$600.00. The Court sets a	med.
Aff.Mail	further Order to Show Cause on	
Aff.Pub.	01/02/14 regarding Larry Donaldson's	
Sp.Ntc.	failure to provide information to the	
Pers.Serv.	successor administrator timely and	
Conf.	imposition of sanctions in the amount of	
Screen	\$800.00. Larry Donaldson is ordered to	
Letters	be personally present on 01/02/14.	
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		<b>Reviewed on:</b> 03/20/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 2C – Wallace
		000

Shepard, Jeff S. (for Petitioners Kevin Hudgins and Danielle Dutra)

1) First and Final Report of Administration; 2) Petition for Allowance of Statutory Fees to Attorney; and 3) for Final Distribution on Waivers of Accounting

DC	D: 12/18/12		KEVIN HUDGINS and DANIELLE DUTRA, Co-Executors, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
			Accounting is waived.	
Со	nt. from Aff.Sub.Wit.		I & A - \$1,394,500.00 POH - \$1,282,000.00	
✓	Verified		Executors - <b>waive</b>	
✓ ✓	Inventory PTC		Attorney - <b>\$26,945.00</b> (statutory)	
✓	Not.Cred.		Distribution, pursuant to Decedent's	
✓	Notice of Hrg	24.7	Will, is to:	
✓	Aff.Mail	W/	<b>Kevin Hudgins</b> - real property located at 2515 McCall Ave.	
	Aff.Pub.		Selma, ½ interest in the residue	
	Sp.Ntc.		consisting of Page Funeral Chapel,	
	Pers.Serv.		2014 Arrants, Selma and furniture and	
	Conf.		furnishings.	
	Screen			
✓	Letters			
	Duties/Supp		Danielle Dutra - ½ interest in	
	Objections		the residue consisting of Page Funeral	
	Video Receipt		Chapel, 2014 Arrants, Selma and furniture and furnishings.	
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			<b>Reviewed on:</b> 3/23/15
	UCCJEA			Updates:
	Citation	l		Recommendation: SUBMITTED
✓	FTB Notice			File 3 - Hudgins

### Atty Shepard, Jeff S. (for Petitioners Kevin Hudgins and Danielle Dutra)

1) First and Final Report of Administration; 2) Petition for Allowance of Statutory Fees to Attorney; and 3) for Final Distribution on Waiver of Accounting

DC	D: 4/20/2013		KEVIN HUDGINS and DANIELLE DUTRA,	NEEDS/PROBLEMS/COMMENTS:
			grandchildren and Co-Executors, are	
			Petitioners.	<u>Page 3</u> is the related case of
				the Estate of Victoria Hudgins,
-			Accounting is waived.	(daughter) 12CEPR01146.
Co	ont. from	Ī		
	Aff.Sub.Wit.		1 & A — \$284,418.55	
✓	Verified		POH — <b>\$284,418.55</b>	
1	Inventory		(no cash)	
	•		Executors — <b>waive</b>	
✓	PTC			
1	Not.Cred.			
1	Notice of		Attorney — \$8,688.37	
•	Hrg		(statutory; to be paid outside probate;)	
	Aff.Mail	W/	Attorney X/O — waives	
ľ	A# D		(waives \$2,400.00 fee for 12 hours @	
	Aff.Pub.		\$200.00/hour for meetings and negotiations	
	Sp.Ntc.		between parties regarding dispute and	
	Pers.Serv.		potential settlement options, preparation of	
	Conf.		agreement and assignment of interest;)	
	Screen			
	Letters 090	413	Distribution, pursuant to Decedent's Will and	
	Duties/Supp		Assignment filed 10/14/2014 is to:	
	Objections		PAULETTE A. HALFORD - \$2,000.00 per	
	Video		month from payments on a promissory note,	
	Receipt		for so long as she lives and the note remains	
	CI Report		unpaid;	
<b>√</b>	9202		<b>KEVIN HUDGINS</b> - <b>50%</b> interest in the	
✓	Order		residue consisting of Installment Note dated	
	Aff. Posting		2/20/2008;	Reviewed by: LEG
	Status Rpt		<b>DANIELLE DUTRA</b> - <b>50%</b> interest in the	<b>Reviewed on:</b> 3/23/15
	UCCJEA		residue consisting of Installment Note dated	Updates:
	Citation		2/20/2008.	Recommendation: SUBMITTED
<b>√</b>	FTB Notice			File 4 – Page

Armas, J. Todd (representing himself as Executor/Petitioner)

Petition for Termination of Further Proceedings and Discharging Personal Representative

DC	D: 06/28/12	TODD J. ARMAS, Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states that the Petition for	
		Probate alleged that there were assets	
		to be administered in this estate	
Со	nt. from	exceeding \$100,000.00. An Inventory &	
	Aff.Sub.Wit.	Appraisal was filed 10/31/14 indicating	
✓	Verified	a real property asset of the estate	
	Inventory	valued at \$75,000.00. Subsequently,	
	PTC	Petitioner discovered that the real	
	Not.Cred.	property asset was held in joint tenancy between the decedent and Kirby	
✓	Notice of	Mathershed and is therefore no subject	
	Hrg	to administration. Petitioner further	
✓	Aff.Mail w/o	alleges that he has diligently searched	
	Aff.Pub.	for assets of the decedent, but has not	
	Sp.Ntc.	discovered any property of any kind belonging to the estate and subject to	
	Pers.Serv.	administration.	
	Conf.		
	Screen	Petitioner prays for an Order:	
	Letters	Terminating further proceedings	
	Duties/Supp	for the administration of the estate;	
	Objections	2. Discharging Petitioner as the	
	Video	personal representative of the	
	Receipt	estate.	
	CI Report		
	9202		
✓	Order	<u> </u>	
	Aff. Posting	=	Reviewed by: JF
	Status Rpt	=	<b>Reviewed on:</b> 03/25/15
	UCCJEA	=	Updates:
	Citation	=	Recommendation:
	FTB Notice		File 5 - Cole

Kruthers, Heather H. (for Public Guardian – Conservator/Petitioner)

Amended First and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and his Attorney; and Distribution

		PUBLIC GUARDIAN, Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: <b>10/09/13 – 05/15/14</b> Accounting: <b>\$115,581.70</b>	
Co	ont. from	Beginning POH: \$ 3,495.00 Ending POH: \$ 82,823.72 (\$3,495.00 is cash)	
\rightarrow \right	Aff.Sub.Wit.  Verified  Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail w/  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf.	Subsequent Account period: 05/16/14 – 12/31/14 Accounting: \$86,462.38 Beginning POH: \$82,823.72 Ending POH: \$76,068.70 (all cash)  Conservator: \$1,687.44 (for 11.64 Deputy hours @ \$96/hr plus 7.50 Staff hours @ \$76/hr, per declaration, including estimated time for management of finances, preparation of income tax returns, preparing statement of services, and making final distribution, pursuant to attached declaration)	
	Screen   Letters   Duties/Supp   Objections   Video   Receipt	Attorney: \$2,000.00 (less than allowed under Local Rule 7.16.B.1, since the Public Guardian did not have to file the paperwork to establish the conservatorship.)  Bond fee: \$145.44 (OK)	
✓ ————————————————————————————————————	Receipt  CI Report	Costs: \$104.00 (for certified Letters)  Petitioner states the Conservatee died testate on 5-15-14. Her will was deposited by the Public Guardian on 8-14-14 (Exhibit E) and heirs are listed in the petition. However, the Conservatee received Medi-Cal benefits before she died and Notice of the Conservatee's death was sent to Medi-Cal on 5-16-14. They sent a claim for \$191,000.00.  After payment of the allowed commissions, fees and costs totaling \$3,936.88, Petitioner requests distribution of the remaining estate of \$72,131.82 to Medi-Cal.	Reviewed by: JF  Reviewed on: 03/25/15  Updates:  Recommendation:  File 6 - Lyster

## 7 Paul Harvey Wallace Trust

Case No. 14CEPR00601

Atty Petoyan, Marcus (for Laura Leonard – beneficiary/Petitioner)
Atty Kruthers, Heather (for Public Administrator – successor trustee)

Probate Status Hearing RE: Account

DOD: 06/22/07	LAURA LEONARD, step-daughter and	NEEDS/PROBLEMS/COMMENTS:
	beneficiary of the Trust, filed a <b>PETITION</b>	
	FOR ORDER ACCEPTING RESIGNATION	See pages 2A, 2B and 2C for related
	OF TRUSTEE AND FOR APPOINTMENT OF THE FRESNO COUNTY PUBLIC	matter.
Cont. from	ADMINISTRATOR SUCCESSOR TRUSTEE on	
Aff.Sub.Wit.	07/02/14.	
Verified	0 00/05/14    0	
Inventory	On 08/25/14, the Petition was granted and the <b>PUBLIC ADMINISTRATOR</b> was	
PTC	appointed as Sucessor Trustee.	
Not.Cred.		
Notice of	Minute Order in related matter estate	
Hrg	matter for Paul Harvey Wallace set this	
Aff.Mail	matter for a status hearing on 3/25/15.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order	_	
Aff. Posting		Reviewed by: JF
Status Rpt		<b>Reviewed on:</b> 03/20/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 7 - Wallace

Shepard, Jeff S. (for Raynette Grant – Executor)

Order to Show Cause RE: Failure to Appear and Failure to File the Inventory and Appraisal

DOD: 4-14-14		RAYNETTE GRANT, Sister, was appointed	NEEDS/PROBLEMS/COMMENTS:
		Executor with Full IAEA with bond of	,
		\$60,000.00 on 9-25-14.	Note: Final I&A was filed 2-5-15.
			<u>.</u>
Co	nt 021115	Bond was filed 10-2-14 and Letters issued 10-16-14.	Minute Order 2-11-15: Mr. Shepard
	Aff.Sub.Wit.	10-10-14.	and Raynette Grant are both ordered to be personally present
	Verified	At the hearing on 9-25-14, the Court set	on 3-25-15; the Court will take of
_	Inventory	status hearing for the filing of the	the issue of increased bond on that
	PTC	Inventory and Appraisal for 1-28-15.	date.
	Not.Cred.		
	Notice of	On 1-28-15, there were no appearances.  The Court set this OSC Re Failure to	
	Hrg	Appear and Failure to file the Inventory	
	Aff.Mail	and Appraisal and ordered both the	
	Aff.Pub.	attorney and the executor to be	
	Sp.Ntc.	personally present in Court on 2-11-15.	
	Pers.Serv.	Final I&A was filed 2-5-15 and indicates a	
	Conf.	total estate value of \$113,395.69	
	Screen	including \$2,486.19 cash, various vehicles	
	Letters	and equipment, and a 40% undivided	
	Duties/Supp	interest in real property.	
	Objections	Status Bonort by Attornov filed 2 20 15	
	Video	Status Report by Attorney filed 3-20-15 states there was an inadvertent error in	
	Receipt	that the hearing dates of 1-28-15 and	
	CI Report	2-1-15 were not posted on his calendar	
	9202	which resulted in his failure to appear.	
	Order	The Inventory and Appraisal of the estate	
	Aff. Posting	has been filed and there was an assumption that the filing of the I&A	Reviewed by: skc
	Status Rpt	removed the hearing from the court	Reviewed on: 3-23-15
	UCCJEA	calendar. The estate is not in a condition	Updates:
<u> </u>	Citation	to be closed; there are not yet sufficient	Recommendation:
	FTB Notice	funds available for payment of the	File 8 - Rowley
		decedent's debts. The attorney and the	
		Executor will be in Court on 3-25-15 as ordered.	
		olueleu.	

Pape, Jeffrey B. (for Christopher B. Davis – Petitioner – Son)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	DOD: 06/23/2015		CHRISTOPHER B. DAVIS, son, is petitioner and	NEEDS/PROBLEMS/COMMENTS:
			requests appointment as Administrator	
			without bond.	Need Affidavit of Publication in
			Sole heir waives bond	the correct newspaper pursuant to Local Rule 7.9A.
Со	nt. from		Goo Hell Walves Berlia	10 20001 Kolo 7.77 t.
	Aff.Sub.Wit.		Petitioner is a residence of Dewey, Arizona.	Proposed personal representative is
✓	Verified		Full IAEA - ?	a resident of Arizona. Probate Code 8571 states notwithstanding a waiver
	Inventory		TOILIVELY ( F	of bond, the court in its discretion
	PTC		Decedent died intestate	may require a nonresident personal
	Not.Cred.			representative to give a bond in an
✓	Notice of Hrg		Residence: Kerman Publication: Need	amount determined by the court.
✓		w/	Estimated value of the Estate:	Note: If the petition is granted status
	Aff.Pub.	X	Real property - \$482,000.00	hearings will be set as follows:
	Sp.Ntc.		Probate Referee: Steven Diebert	<ul> <li>Wednesday, 07/22/2015 at</li> </ul>
	Pers.Serv.		Trobate Referee. Sievert bleber	9:00a.m. in Dept. 303 for the filing
	Conf.			of the inventory and appraisal
	Screen			<u>and</u>
✓	Letters			•Wednesday, 05/25/2016 at
✓	Duties/Supp			9:00a.m. in Dept. 303 for the filing
	Objections			of the first account and final
	Video			distribution.
	Receipt			Pursuant to Local Rule 7.5 if the required
	CI Report			documents are filed 10 days prior to the
	9202			hearings on the matter the status hearing
✓	Order			will come off calendar and no appearance will be required.
				appodidito mii bo tequited.
	Aff. Posting			Reviewed by: LV
	Status Rpt			<b>Reviewed on:</b> 03/20/2015
	UCCJEA			Updates:
	Citation			Recommendation:
<u>L</u>	FTB Notice			File 9 - Davis
				0

10

Kruthers, Heather H. (for Public Guardian – Conservator – Petitioner)) Atty Atty

LeVan, Nancy J. (Court appointed for Proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

			See petition for details.	NEEDS/PROBLEMS/
				COMMENTS:
				Court Investigator
				advised rights 3-12-15
				Voting rights affected
	Aff.Sub.Wit.			Voting rights affected – need minute order.
~	Verified			
	Inventory			Note: Notice of Hearing
	PTC			filed 2-13-15 indicated that a daughter, Carol
	Not.Cred.			Thompson, is homeless
~	Notice of			and here whereabouts
	Hrg			are unknown. Pursuant to
~	Aff.Mail	W		the Minute Order of 2-24- 15, the Public Guardian is
	Aff.Pub.			to make efforts to locate
	Sp.Ntc.			the daughter and report
>	Pers.Serv.	W		back to the Court at the general hearing.
	Conf.			general nearing.
	Screen			Note: The Court will set
~	Letters			status hearings as follows:
	Duties/Supp			<ul> <li>Wed, August 26, 2015</li> </ul>
	Objections			for the filing of the
	Video			Inventory and
	Receipt			Appraisal
~	CI Report			<ul> <li>Wed, June 22, 2015</li> </ul>
	9202			for the filing of the first
~	Order			account
				If the proper items are on
				file prior to the status
				dates, the status hearings
				may be taken off calendar.
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 3-23-15
	UCCJEA			Updates:
~	Citation			Recommendation:
	FTB Notice			File 10 - Beatty

Haught, Rex A (for Ricky R. Lockhart – Petitioner – Surviving Spouse)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 10/04/2014			RICKY R. LOCKHART, surviving spouse is	NEEDS/PROBLEMS/COMMENTS:
			petitioner and requests appointment as	
			Administrator without bond.	Note: If the petition is granted status
			All Lands and All Lands	hearings will be set as follows:
Co	nt. from		All heirs waive bond	<ul> <li>Wednesday, 07/22/2015 at</li> </ul>
	Aff.Sub.Wit.		Full IAEA – o.k.	9:00a.m. in Dept. 303 for the filing
	Verified		TOWN LET CO.N.	of the inventory and appraisal
			Decedent died intestate	and
	Inventory			Washington 05/05/0017 at
	PTC		Residence: Fresno	•Wednesday, 05/25/2016 at
	Not.Cred.		Publication: The Business Journal	9:00a.m. in Dept. 303 for the filing of the first account and final
✓	Notice of		Estimated value of the Estate:	distribution.
	Hrg		Estimated value of the Estate:  Personal property - \$50,000.00	distribution.
✓	Aff.Mail	w/	Real property - \$250,000.00	Pursuant to Local Rule 7.5 if the required
	Aff.Pub.		Total - \$300,000.00	documents are filed 10 days prior to the
				hearings on the matter the status hearing
	Sp.Ntc.		Probate Referee: Steven Diebert	will come off calendar and no
	Pers.Serv.			appearance will be required.
	Conf.			
	Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt	-		<b>Reviewed on:</b> 03/20/2015
	UCCJEA			Updates:
	Citation			Recommendation: Submitted
	FTB Notice			File 11 - Lee
				11

Guerrero, Danielle (for Dolores Trujillo, sole remaining Co-Administrator)
Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

FIOL	Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution				
DOD: 1-12-89	MARY ELLEN RODRIGUEZ and	NEEDS/PROBLEMS/COMMENTS:			
	<b>DOLORES TRUJILLO</b> , Daughters, were				
	appointed as Co-Administrators	Note: On 2-23-15, the Court confirmed			
	without IAEA and with bond of	the sale of real property and set status			
Cont. from 081414,	\$8,000.00 on 1-16-1990.	hearing for receipt of the proceeds into a			
100214, 110614,		blocked account (Page B).			
121814, 020215,	Bond was filed and Letters issued on	1. Need Petition for Final Distribution or			
022315	1-17-1990.	current written status report pursuant			
Aff.Sub.Wit.	Nothing further was filed.	to Local Rule 7.5 which states in all			
	Nothing tormer was filed.	matters set for status hearing verified			
Verified	The open estate was discovered	status reports must be filed no later			
Inventory	and the Court set this status	than 10 days before the hearing.			
PTC	hearing.	Status Reports must comply with the			
Not.Cred.		applicable code requirements.			
Notice of	The I & A was filed 10-1-14, showing	Notice of the status hearing, together			
Hrg	the estate value at \$30,000.00.	with a copy of the Status Report shall			
Aff.Mail		be served on all necessary parties.			
Aff.Pub.					
Sp.Ntc.					
Pers.Serv.					
Conf.	1				
Screen					
Letters					
Duties/Supp					
Objections					
Video					
Receipt					
CI Report					
9202	]				
Order		<u> </u>			
Aff. Posting	]	Reviewed by: skc			
Status Rpt		Reviewed on: 3-23-15			
UCCJEA		Updates:			
Citation	]	Recommendation:			
FTB Notice		File 12A – Rodriguez			

12A

Guerrero, Danielle (for Dolores Trujillo, sole remaining Co-Administrator)

Probate Status Hearing RE: Receipt for Net Funds in Blocked Account

DOD: 1-12-89	DOLORES TRUJILLO, Daughter, is the sole	NEEDS/PROBLEMS/COMMENTS:
DOD: 1-12-07	remaining Administrators without IAEA	NEEDS/TROBLEMS/COMMENTS.
	and with bond of \$8,000.00.	Need receipt for blocked
	=	account (MC-356).
	On 2-23-15, the Court confirmed the	, ,
	sale of real property and ordered the	
Aff.Sub.Wit.	net proceeds of \$12,000.00 to be	
Verified	deposited into a blocked account.	
Inventory	The Court set this status hearing for the	
PTC	filing of the receipt for blocked	
Not.Cred.	account.	
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 3-23-15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 12B - Rodriguez

12B

Georgouses, Thomas J. (for Executor Christine Hays)

Status Hearing Re: Filing of the Informal Accounting

DOD: 12/23/11	CHRISTINE HAYS is Executor.	NEEDS/PROBLEMS/COMMENTS:
Cont. from  Aff.Sub.Wit.  Verified  Inventory	Order and Judgment of Final Distribution was entered on 10/14/14. The order included a closing reserve of \$25,000.00.  Minute Order dated 10/14/14 set this status hearing for an informal	
PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen	accounting of the closing reserve.  Status Report filed on 03/12/15. Attorney Thomas Georgouses reports that a total of \$941.45 of the closing reserve was used to pay for bookkeeping, the CPA and bank fees. There remains a balance of \$24,124.51.  Petitioner is prepared to make distribution of the closing reserve, less the \$4.00 bank fee, to:	
Letters  Duties/Supp Objections Video Receipt C1 Report 9202 Order Aff. Posting Status Rpt UCCJEA	Christine Hays - \$6,030.12 Ann Hays Walorinta - \$6,030.13 Lynn Hays Kyle - \$6,030.13 Michael R. Hays - \$6,030.13  If the Court declines Petitioner's intention to distribute the remaining amount of proceeds previously held for reserve, Petitioner requests the amount to be held in reserve no exceed \$5,000.00 for no more than one year from the date of this hearing.	Reviewed by: KT Reviewed on: 3/23/15 Updates:
Citation FTB Notice		Recommendation: File 13 - Hays

Rube, Melvin K (for Joyce V. Davis – Conservator – Petitioner)
Petition of Conservator for Instructions

	JOYCE V. DAVIS, Sister and	NEEDS/PROBLEMS/COMMENTS:
	Conservator of the Person	NEEDS/TROBLEMS/COMMENTS.
	and Estate with bond of	Note: This petition was filed by the Conservator, in
	\$333,000.00, is Petitioner.	pro per, on 8-18-14. Pursuant to Declaration of Melvin K. Rube filed 3-6-15, he has now been retained to
Cont. from 093014,	1	represent the Conservator and requests a 60-day
102214, 121014	Petitioner requests to sell the conservatee's real property	continuance to file a supplemental inventory and
Aff.Sub.Wit.	and vehicle because funds	appraisal, amend the accounting, and also file a
Verified	are needed for her upkeep.	petition to resign as conservator of the estate and for appointment of Bruce Bickel as successor
Inventory		conservator of the estate.
PTC	Note: The vehicle referred to	
Not.Cred.	in this petition has not been	The following issues remain noted for reference only:
Notice of	inventoried as an asset of the conservatorship estate.	Petitioner's First Account filed 5-15-14 was not in compliance with applicable law, and was
Hrg	The conservatorship estate.	denied on 6-24-14. This "Petition for Instructions"
Aff.Mail	1	filed 8-18-14 requests authority to sell various assets; however, it does not contain the
Aff.Pub.	1	information necessary for the Court to consider
Sp.Ntc.	1	this type of request. Further, the Court may require the First Account to be settled before
Pers.Serv.	1	authorizing further action by the Conservator. See
Conf.	1	Probate Code §§ 1020, 1060, 2540, 2620, Cal.
Screen		Rules of Court 7.575, Local Rule 7.1.1.C., and other applicable law and rules. Specifically,
Letters		§2540 requires that the sale be discussed with the
Duties/Supp		Conservatee.
Objections		2. Based on the Inventory and Appraisals that have been filed, Petitioner's bond of \$333,000.00,
Video	1	based on her original estimate, is insufficient.
Receipt	=	Petitioner is reminded of her duty to increase bond pursuant to Cal. Rules of Court 7.204.
CI Report	=	Examiner calculates the appropriate bond
9202	_	amount to be \$502,194.24, not including the
Order		house, and also not including the vehicle that Petitioner refers to, because it has not been
		inventoried as an estate asset. If the house and
		vehicle are authorized to be sold, the bond amount will need to be adjusted accordingly.
		3. The Conservatee is entitled to notice of this
		petition. See Probate Code §1460. (Note:
		Petitioner mailed notice of the amended account at Page B to the Conservatee, but not this
		petition.)
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 3-23-15
UCCJEA	1	Updates:
Citation	4	Recommendation:
FTB Notice		File 14A - Thomas
		14A

Davis, Joyce V. (Pro Per – Sister – Conservator – Petitioner)
Second Amended Account and Report of Conservator and Petition for its Settlement Atty

		JOYCE V. DAVIS, Sister and Conservator of the	NEEDS/PROBLEMS/COMMENTS:
		Person and Estate with bond of \$333,000.00, is	
		Petitioner.	Note: This petition was filed by
		Account period: 3-14-13 through 3-14-14	the Conservator, in pro per, on 10-22-14. Pursuant to
	nt from 121014	Accounting: \$866,751.47	Declaration of Melvin K. Rube
	Aff.Sub.Wit.	Beginning POH: \$ 11,334.12	filed 3-6-15, he has now been
		Ending POH: \$780,811.53	retained to represent the
~	Verified	Conservator: No compensation requested	Conservator and requests a 60-day continuance to file a
	Inventory	' '	supplemental inventory and
	PTC	Petitioner states the conservatee's automobile	appraisal, amend the
	Not.Cred.	has not been sold. The car was used to transport the Conservatee and her six dogs to the	accounting, and also file a
~	Notice of	veterinarian and to the pet store for food. The car	petition to resign as
	Hrg	has only been driven by the Conservator's	conservator of the estate and for appointment of Bruce
~	Aff.Mail w/o	husband with the Conservatee for this purpose.	Bickel as successor
	Aff.Pub.	He took the car in for all recalls and maintenance.	conservator of the estate.
	Sp.Ntc.	The insurance company was notified that the	
	Pers.Serv.	conservatee's (sic) husband would be the only	The following issues remain noted for reference only:
	Conf.	authorized driver. The vehicle will be sold as soon as Conservator can obtain the pink slip. The DMV	noted for reference only.
	Screen	will not issue a new pink slip. The Conservatee did	<u>SEE PAGE 2</u>
>	<b>Letters</b> 3-22-13	not filet he Lien Satisfied/Legal Owner/Title Holder	
	Duties/Supp	Release with the DMV. The vehicle was paid off	
	Objections	several years ago, and the conservator wrote to	
	Video	Toyota, but has had no response. Conservator will	
	Receipt	follow up on this.	
<b>&gt;</b>	CI Report	Petitioner states the home located in Chino Hills,	
<b>&gt;</b>	2620(c)	CA, was in need of major cleanup and repairs	
	Order X	due to Conservatee living there for years with	
	Aff. Posting	health issues. Conservator has secured the	Reviewed by: skc
	Status Rpt	property and has begun cleanup and hopes to	Reviewed on: 3-23-15
	UCCJEA	sale the house because Conservatee will be unable to return to her home in the future. Funds	Updates:
	Citation	will be used for her placement at Somerford	Recommendation:
	FTB Notice	Place. The condition of the house prevents it	File 14B – Thomas
		being rented, and there is no income being	
		generated from the property. No furniture or	
		furnishings have bene sold or removed from the	
		house. Conservator has begun to contact	
		auctioneers and antique dealers.	
		Petitioner requests that the First Account be	
		settled, allowed, and approved as filed, and all	
		acts and proceedings of Petitioner be confirmed	
		and approved.	

#### Page 2

#### **NEEDS/PROBLEMS/COMMENTS:**

1. Petitioner's Summary of Account states the beginning Property On Hand was \$11,334.12; however, it is unclear what this figure represents, as there is no schedule showing Beginning Property on Hand. The I&A and Supplemental I&A totaled \$781,540.22, of which \$397,060.22 was cash. That should be the beginning Property On Hand figure.

Further, the Summary then indicates \$20,000.64 in additional property received, \$55,189.81 in regular receipts, \$501.04 in gains, and \$779,725.86 as "other charges," which are all similarly unclear.

Further, it appears that many of the assets Petitioner originally categorized as "cash" are now categorized as "non-cash" in the Ending Property on Hand, and if that is the case, those assets require appraisal by the Probate Referee. See Probate Code §8900 et seq. This includes the characterization and appraisal of the retirement account and various insurance policies.

Need further amended account pursuant to §1060 et seq., and possibly amended I&A pursuant to §8900 et seq. Petitioner is strongly encouraged to seek assistance from an attorney going forward, as it continues to appear that non-attorney document services are not meeting her needs.

- 2. As noted on Page A, Petitioner's bond appears insufficient. However, it appears clarification regarding #1 is necessary above in order for to confirm an appropriate bond calculation. As noted on Page A, Examiner calculates that bond should be at least \$502,194.24, not including the house (because the Conservator does not currently have authority to sell the house) and not including the vehicle (because it was not inventoried as an asset of the conservatorship estate). Petitioner is again reminded of her duty to apply for increase in bond when appropriate pursuant to Cal. Rule of Court 7.204.
- 3. Petitioner's descriptions of various expenses are not sufficient to determine what the expenses were for. Specifically: "SIGNON" on 3-18-13, "AT HM REWA" on 3-26-13, and "PWA" on 4-15-13. Please note: Petitioner's other disbursements at various stores such as Costco and Target are similarly unclear; however, Petitioner provided pages and pages of copies of receipts thereafter. For future reference, copies of receipts are unnecessary and serve to add bulk and confusion to the accounting document. If properly prepared, receipts are unnecessary because the accounting should simply provide adequate descriptions of the transactions in the schedules. The only required documentation are bank statements and care facility statements pursuant to Probate Code §2620, unless otherwise requested by the Court.
- 4. The Disbursements Schedule indicates two donations to Greenpeace totaling \$100.00 in March and April 2013. The Court may require clarification with reference to Cal. Rule of Court 7.1059 (Standard of Conduct for Conservators of the Estate), specifically (b)(3), which prohibits making gifts with conservatorship estate funds without authorization.

Jimenez, Irene (pro per – paternal aunt/Petitioner) Atty Atty

Jimenez, Cutberto (pro per – paternal uncle/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 10	NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
Cont. from 011415, 021115  Aff.Sub.Wit.  Verified  Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail n/a  Aff.Pub.  Sp.Ntc.  Pers.Serv. n/a  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt  CI Report  9202  Vorder	IRENE JIMENEZ and CUTBERTO JIMENEZ, paternal aunt and uncle, are Petitioners.  Father: ALFREDO ORTEGA – Consent & Waiver of Notice filed 11/10/14  Mother: AMBER STICKLES – Consent & Waiver of Notice filed 02/02/15  Paternal grandfather: APOLINAR ORTEGA—Consent & Waiver of Notice filed 03/16/15 Paternal grandmother: VIRGINIA CARRIZALES – Consent & Waiver of Notice filed 02/02/15  Maternal grandfather: CARL SHARP – Consent & Waiver of Notice filed 03/16/15 Maternal grandmother: TANYA SHARP – Consent & Waiver of Notice filed 02/02/15  Petitioners state that neither parent has the means to care for the minor. The minor has lived with petitioners since October 2014 and wants to continue to live with them.  Court Investigator Samantha Henson filed a report on 01/09/15.	CONTINUED FROM 02/11/15  Note: Petitioners have also petitioned for guardianship of Natalie's sister, Vanity Ortega. The general guardianship hearing for Vanity is set for 05/21/15.
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 03/23/15
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 15 – Ortega & Saldivar

Atty Eroles, Kayla Michelle (Pro Per – Mother – Petitioner)

Atty Eroles, Ricardo J. (Pro Per – Maternal Grandfather – Guardian)
Atty Eroles, Teresa L. (Pro Per – Maternal Grandmother – Guardian)

Petition for Termination of Guardianship

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
			, and the same of	, , , , , , , , , , , , , , , , , , , ,
				1. The Court may require
				notice to all relatives pursuant to Probate Code
Со	nt from 012815			§1460(b)(5).
	Aff.Sub.Wit.			3. 100(0)(0).
~	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of	Х		
	Hrg			
	Aff.Mail	Χ		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
<u> </u>	CI Report			
	9202			
<u> </u>	Order			B. i II
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 3-23-15
	UCCJEA Citation			Updates:  Recommendation:
	FTB Notice			File 16 - Eroles
<u>  L</u>	FID NOTICE			rile 10 - ElOles

## Brooklyn Angelique Joy Moser (GUARD/P) Case No. 14CEPR00881

17

Atty

Harris, Justin D. (for Candice Angelique Moser – maternal grandmother/Petitioner) Petition for Appointment of Guardian of the Person (Prob. C. 2250)

			TEMPORARY EXPIRES 03/25/15	NEEDS/PROBLEMS/COMMENTS:
Cont. from 100714, 120314		4,	CANDICE ANGELIQUE MOSER, maternal grandmother, is Petitioner.  Father: DAVID CONTRERAS	CONTINUED FROM 01/28/15 Minute Order from 01/28/15 states: Mr. Harris is to file a Declaration of Due Diligence regarding his efforts to locate the father.
\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	Aff.Sub.Wit.  Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order	x	Mother: SAMANTHA MOSER – Personally served on 10/16/14 and Consents per minute order of 12/03/14  Paternal grandparents: UNKNOWN – Court dispensed with notice on 12/03/14  Maternal grandfather: ROMAN GARCIA  Petitioner alleges [See Petition for Details].  Court Investigator Samantha Henson filed a report on 11/25/14.	As of 03/25/15, nothing further has been filed and the following items remain:  1. Need Notice of Hearing.  2. Need proof of service of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person at least 15 days before the hearing or Consent & Waiver of Notice or Declaration of Due Diligence for:  a. David Contreras (father) – personal service required  b. Roman Garcia (maternal grandfather) – service by mail sufficient
Ě	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 03/25/15
<b>✓</b>	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 17 - Moser
				17

17

# 18 Samuel Kennedy, Isalyn Kennedy, Marienna Kennedy and Jaclynn Kennedy Case No. 14CEPR00964

Atty Ochoa, Janete M. (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		NO TEMPORARY IN PLACE;	NEEDS/PROBLEMS/COMMENTS:
		TEMPORARY DENIED ON 10/30/14 DUE TO NON APPEARANCE	CONTINUED FROM 02/11/14
		JANETE OCHOA, maternal grandmother, is Petitioner.	Need proof of service of     Notice of Hearing with a     copy of the Petition for
Cont. from  Aff.Sub  ✓ Verified	.Wit.	Father: <b>MANUEL KENNEDY –</b> Personally served on 02/05/15	Appointment of Guardian of the Person at least 15 days before the hearing <u>or</u>
PTC		Mother: <b>LISA MAYFIELD –</b> Personally served on 02/05/15	Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Samuel Kennedy
Not.Cre ✓ Notice Hrg	of	Paternal grandfather: MANUEL KENNEDY – deceased Paternal grandmother: ISABEL KENNEDY –	(minor) – personal service required
Aff.Mai	).	Personally served on 02/06/15	
✓ Pers.Se ✓ Conf.		Maternal grandfather: JACK MAYFIELD – deceased	
Screen  Letters	1	Siblings: MANUEL KENNEDY (17), MICHAEL KENNEDY (1), BRANDON GRAHAM (20) – Manuel	
✓ Duties/		& Brandon served by mail on 03/09/15  Petitioner states [See Petition for details]	
Video Receip		Court Investigator Dina Calvillo filed a report on	
9202	ort	12/09/14.	
Aff. Pos			Reviewed by: JF Reviewed on: 03/25/15
✓ UCCJE	A		Updates:
Citatio			Recommendation: File 18 - Kennedy

18

## Jorge Gonzales, Matthew Gonzales, (GUARD/P) Case No. 15CEPR00078 Erika Gonzales, Federico Ortega, Jr., and Natalie Ortega

Atty Damian, Gabriella (Pro Per – Maternal Aunt – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

reliion of Appointment of Godralan of the Felson (Flob. C. 1910)		
		NEEDS/PROBLEMS/COMMENTS:
Aff.Sub.Wit.  ✓ Verified  Inventory	Please see petition for details	<ol> <li>Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:         <ul> <li>Jorge Gonzales (Minor)</li> </ul> </li> </ol>
PTC Not.Cred.  Notice of Hrg  Aff.Mail W/ Aff.Pub. Sp.Ntc. Pers.Serv.  Conf. Screen		<ul> <li>2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul> <li>Paternal Grandfather (Unknown)</li> <li>Paternal Grandmother (Unknown)</li> </ul> </li> </ul>
<ul><li>✓ Letters</li><li>✓ Duties/Supp</li><li>Objections</li></ul>		<ul> <li>Ruth Garcia (Maternal Grandmother)</li> </ul>
Video Receipt		
✓ CI Report		
9202 Order		
•		Parished by a LV/
Aff. Posting		Reviewed by: LV
Status Rpt   ✓ UCCJEA		Reviewed on: 03/23/2015 Updates:
Citation		Recommendation:
FTB Notice		File 21 – Gonzales & Ortega

### 23 Lisa Rodriguez, Marcelo Rodriguez, Lorenzo Rodriguez (GUARD/P)

Case No. 15CEPR00258

Atty Rodriguez, Pablo Jr. (pro per – paternal grandfather/Petitioner)
Atty Rodriguez, Rebecca (pro per – paternal grandmother/Petitioner)

Petition for Appointment of Temporary Guardian of the Person

			Fellion for Appointment of Temporary Gut	1
			GENERAL HEARING: 05/18/15	NEEDS/PROBLEMS/COMMENTS:
Co	nt. from		PABLO RODRIGUEZ, JR. and REBECCA RODRIGUEZ, paternal grandparents, are Petitioners.	Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of
F	Aff.Sub.Wit.		Father: <b>PETE RODRIGUEZ, JR.</b> – Consent	Temporary Guardian of the Person <u>or</u>
<b>√</b>	Verified		& Waiver of Notice 03/11/15	Consent & Waiver of Notice for Felicia Garcia (mother). – Unless
	Inventory			diligence is found.
	PTC		Mother: <b>FELICIA GARCIA</b> – Declaration	Note: The Petition indicates that the
	Not.Cred.		of Due Diligence filed 03/19/15	children have Indian ancestry. <b>Notice of</b>
	Notice of	Х		Child Custody Proceeding for Indian Child (Form ICWA-030) was served on
	Hrg	<u> </u>	GARCIA	the necessary parties on 03/12/15.
_	Aff.Mail		Maternal grandmother: MARY HELEN SANCHEZ	
	Aff.Pub.		SANCITE	
	Sp.Ntc.		Siblings: MARCELA GARCIA, PETE	
	Pers.Serv.	Х	RODRIGUEZ, III, AMERISSA RODRIGUEZ	
<b>\</b>	Conf.		<b></b>	
<b>-</b>	Screen		<b>Petitioners state</b> [See Petition for details]	
	Letters			
<b>√</b>	Duties/Supp			
-	Objections	<u> </u>		
	Video			
-	Receipt			
	CI Report			
<b></b> ✓	9202 Ordor			
ľ	Order			Reviewed by: JF
	Aff. Posting Status Rpt			Reviewed by: 3F  Reviewed on: 03/25/15
<b>√</b>	UCCJEA	<u> </u>		Updates:
	Citation			Recommendation:
	FTB Notice			File 23 - Rodriguez

Elizabeth A. McCann (Estate)

Burnside, Leigh W. (for John P. McCann and Colleen E. Dempsey – Co-Executors – Petitioners)

Petition for Preliminary Distribution

	D: 8-7-10		JOHN P. MCCANN and COLLEEN E. DEMPSEY,	NEEDS/PROBLEMS/
			Co-Executors with Full IAEA without bond, are Petitioners.	COMMENTS:
			Tomoriors.	This matter is set for
			<b>I&amp;A Partial No. 1 (Corrected)</b> filed 2-18-15	<u>3:30 pm in Dept. 502.</u>
	-		indicates \$64,134.87 cash plus various securities	
	Aff.Sub.Wit.		and an annuity contract, for a total of	1. Petitioners do not
>	Verified		\$446,813.85.	address notice to the various agencies
>	Inventory		<b>I&amp;A Partial No. 2 (Final)</b> filed 2-28-14 indicates an	pursuant to Probate
~	PTC		additional \$31,737.23 in cash.	Code §9202, including
~	Not.Cred.			the Director of Health
~	Notice of		Total Inventory and Appraisal Value: \$478,551.08.	Care Services, the
	Hrg		Petitioners state they are holding a balance of	Director of the CA Victim Compensation
>	Aff.Mail	W	\$525,773.97, of which \$368,334.12 is in cash. Cash	and Government
	Aff.Pub.		of \$200,000.00 can be distributed to John P.	Claims Board, and the
	Sp.Ntc.		McCann and Colleen E. Dempsey as Co-Trustees	CA Franchise Tax
	Pers.Serv.		of the Surviving Trustor's Trust in accordance with	Board.
	Conf.		the decedent's will without loss to creditors or injury to the estate of any interested person. The	Need further
	Screen		Surviving Trustor's Trust is the sole beneficiary of	information prior to
>	Letters		the estate and the aggregate of all property	authorizing preliminary
	Duties/Supp		distributed does not exceed 50% of the net value	distribution pursuant to
	Objections		of the estate. The value of the amount remaining	Probate Code §11621.
	Video		in the hands of the personal representatives after	
	Receipt		the preliminary distribution will be \$325,773.97, which is more than sufficient to pay all	
	CI Report		commissions, fees and costs of administration.	
	9202	Χ	Continuisions, 1003 and 00313 of darrings and in	
>	Order		The estate is not in a position to close because	
	Aff. Posting		the personal representatives are waiting for a final	Reviewed by: skc
	Status Rpt		determination of the claim against Daniel J.	<b>Reviewed on:</b> 3-23-15
	UCCJEA		McCann for monies alleged to have been taken by Mr. McCann from the decedent filed in the	Updates:
	Citation		trust matter 11CEPR00871. The monies may	Recommendation:
	FTB Notice	Х	belong to the decedent's estate.	File 1 - McCann
			No prior distributions have been made in this matter. Petitioners request the Court waive bond under § 11622.	
			Petitioners pray for an order of this Court as follows:  1. That cash in the amount of \$200,000.00 be ordered distributed to John P. McCann and Colleen E. Dempsey, Co-Trustees of the Surviving Trustor's Trust, the sole beneficiary of the estate;  2. That no bond will be required of the distributed in this matter;  3. The costs of this proceeding be ordered paid by the estate; and  4. Such further orders as the Court may deem proper.	1